

**Probate Committee
Judicial Conference of Indiana**

March 3, 2006
Minutes

1. Members present. The following members of the committee were present: David Bolk, Larry Bradley, Susan Orr Henderson, Wayne Lennington, and Peter Nemeth, Kevin Barton, Chair.
2. Staff present. Michelle C. Goodman provided the committee with staff assistance.
3. Approval of minutes. The Committee amended the minutes to reflect that Judge Lennington was not present at the November meeting and approved the minutes as amended from the November 18, 2005 meeting.
4. Deskbook revisions. The Committee reviewed the outline of topics for the trust and POA sections of the Deskbook. The Committee discussed the fact that the Deskbook would be a basic discussion on these topics since the Legislature and Probate Section continuously revise these statutes. The Committee discussed some of the trust forms submitted and discussed whether language should be included on forms 5, 10, and 20 regarding undocketing a trust when the action is complete. The Committee also discussed the possibility of adding additional topics on uniform acts, burial/funeral matters, non-probate transfers, etc. Committee members then volunteered to draft the following topics for the Deskbook:
 - Powers of Attorney – Judge Lennington
 - Trusts (Jurisdiction through Court Actions) – Judges Bolk and Henderson
 - Trusts (Court determinations through Miscellaneous) – Judge Barton
 - Trust forms – Judge Nemeth (provided to Committee at this meeting)
 - Review 2006 enactments – Com. BradleyThe Committee agreed to submit all drafts in electronic format to Michelle by August 1, 2006. Michelle will periodically remind members of this deadline and provide all submissions to the Committee prior to the August meeting date.
5. Report from State Bar Section meeting. Judge Barton provided a written report on the activities of the Section meeting held in January. The Committee reviewed and discussed the report during the meeting.
6. Legislation. Judge Barton provided an overview of SB 114, which is the only probate legislation currently pending this session. There were two other bills introduced, but neither received a hearing.
7. Other business. The Committee discussed the possibility of using conference call meetings in the future when the agenda is too short to justify the lengthy travel times. The Committee felt it was still good to meet in person a couple times a year.
8. 2006 meeting schedule. The remaining meetings scheduled for 2006 is August 25, 2006; November 17, 2006. All meetings will begin at 1:30 p.m. (Indianapolis time) at the Judicial Center.

Respectfully Submitted,

Michelle C. Goodman